



To: MTC Executive Committee
From: John Ficara, Chair Strategic Planning Committee
Date: November 16, 2022
Subject: SPC Report First Quarter FY 2023

Strategic Planning Committee Mission Statement:

The Multistate Tax Commission is an intergovernmental state tax agency consisting of compact member states and other states that participate in and support the Commission's activities. Our mission is to:

- Promote uniform and consistent tax policy and administration among the states.
- Assist taxpayers in achieving compliance with existing tax laws.
- Advocate for state and local sovereignty in the development of tax policy.

Strategic Planning Committee Vision:

We are recognized as:

- The preeminent organization for tax policy development (as achieved through Uniformity and Nexus Committee projects).
- A respected authority for its knowledge of, educational programs on, and discussion of tax policy and administration (as achieved through MTC training programs and Uniformity, Nexus, Litigation, and Audit Committee projects).
- The leading resource for ensuring equitable tax compliance by taxpayers and equitable tax administration by taxing jurisdictions (as achieved through Uniformity, Nexus, Litigation, and Audit Committee projects, plus the MTC multistate voluntary disclosure and alternative dispute resolution programs).

The Strategic Planning Committee (SPC) met in-person on August 3, 2022 as part of the in-person MTC summer committee meetings. The SPC discussed continued options for reigniting aspects of a strategic planning effort for the MTC. The SPC had previously determined that an initial focus should be on possible changes to the Mission, Vision and Values (MVVs) of the MTC. It was agreed that this would be the best way to begin this process. At the August committee meeting, Chair Ficara oversaw discussion about a survey to be conducted in the early fall on the MVVs. Draft survey questions were distributed and discussed. The survey was distributed to the states at the end of August. Results have been compiled for review and discussion by the SPC at its meeting this week. Once finalized, the revised MVVs will help guide the Commission's work over the next 3-5 years and beyond. Ficara has noted that ongoing strategic planning is akin to scheduled maintenance for a vehicle, and also emphasized the importance of making sure the MTC standing committees continue to be a part of the discussions.

At the August meeting, the SPC also received an update on training efforts by MTC staff. MTC Deputy Executive Director Scott Pattison provided an overview on training, which will be virtual and in-person going forward. He indicated that the recommendations in the report of the SPC workgroup on training were being implemented, and that the workgroup continues to be available as needed.